Methodology

26 Articles on Design Considerations in Qualitative, Quantitative, & Mixed Methods Research

Plus Thoughts on becoming a methodologist

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The contents of this compilation include a selection of 26 articles appearing in *Research Design Review* from **2010 to 2017** concerning a variety of design considerations in qualitative, quantitative, and mixed methods research, plus 2 articles on becoming a methodologist. Excerpts and links may be used, provided the proper citation is given.

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Mixed Methods & Synergy in Qualitative-Quantitative Designs

Embracing Methodologists

Bill Neal – long-time colleague and founder/senior partner at SDR Consulting – wrote an article back in 1998 titled, "The Marketing Research Methodologist." In it, Bill advocates for "the recognition of the marketing research methodologist as a specialty and specific job title in the marketing research profession." He defines the methodologist as someone "who has a balanced and in-depth knowledge of the fields of statistics, psychometrics, marketing, and buyer behavior and applies that knowledge to describe and infer causal relationships from marketing data." I espoused a similar notion in a 2001 article where I talked about the benefits of striving towards the methodologist title and, specifically, the significant strides qualitative researchers could gain from "widening their knowledge and appreciation of quantitative design issues."

The idea of researcher transformed into methodologist is an important one because of its impact on research design. I believe that a methodologist approach to design is neither quantitative nor qualitative but the learned consideration of all methods and techniques in order, as Bill says, "to understand why buyers (consumers and organizations) do what they do"; not unlike Research Design Review's recurring theme – to understand how people *think*.

Back in 1998 and 2001 the goal of methodologist was a daunting one requiring: lots of academic schooling in brick-and-mortar institutions, traveling long (and expensive) distances to conferences, finding time from our work schedules to meet informally with peers to absorb their knowledge, searching for training workshops to learn new methods and techniques, and subscribing to many journals and trade publications to keep us abreast of the latest breakthroughs (as well as the comings and goings) across the realms of research, marketing, advertising, psychology, sociology, and political science.

Thank goodness we are where we are today. I cannot think of a better time to strive for methodologist status. At no other time has the research community had such a fluid and accessible opportunity to grow and gain knowledge within and across traditional marketing research borders. Twitter and LinkedIn have totally changed the way we communicate with our peers, our clients, and our trade associations. We no longer wait weeks or months between networking events to hear what others are doing in the industry. We no longer need to travel long distances to participate in an educational presentation because countless (generally,

free) Webinars are offered to us each week. While organizations such as AMA, TMRE, CASRO, QRCA, and MRA continue to hold live, in-person conferences, we no longer miss out if a scheduling conflict prevents us from attending because continuous online feeds nourish us with a blow-by-blow of events – and in December we can conference virtually at The NewMR Virtual Festival. Our journals and trade publications have been abundantly supplemented with online access, e-versions, as well as blogs and discussion groups of every conceivable stripe. And, if this was not enough, our entire U.S.-centric research world has burst open to embrace the knowledge and perspective of our colleagues across the globe.

What a great time to become a methodologist!

How to Become a "Researcher": The Donning of Many Hats

Research Design Review is a blog devoted to qualitative and quantitative research design issues. Yet, there is an imbalance in these discussions with many of the posts dedicated to qualitative design and methods. The reason boils down to the fact that there is simply a lot to say about qualitative design. And this is because *relatively* little is written or discussed in the research community in answer to such questions as, "What is the basis of sound qualitative research design?" "What are the necessary components to a 'quality' qualitative design?" and "How does the researcher effectively put into practice these quality design elements?" These are the questions routinely addressed among dedicated survey researchers yet too often absent in the qualitative orbit.

An underlying current running throughout *RDR* is the idea that quality design issues are important to all research, regardless of whether the researcher leans more to the qualitative or to the quantitative side of the equation. Pushing this idea one step further, there is an even more subtle suggestion lingering in *RDR* that researchers might do well to free themselves from their qualitative or quantitative "hats" and instead take on the mantle of "methodologist" by finding a comfort zone in which they can competently develop and manage both qualitative and quantitative designs. Partnering with method experts for a given study may be appropriate but this expertise should not shield the researcher from the intricacies of a particular approach. Indeed, it behooves researchers to be knowledgeable about both qualitative and quantitative research in order to confidently manage (for instance) mixed-method studies, exploiting the full measure of what these diverse approaches have to offer while ensuring quality and ultimately useful outcomes.

A 2010 post in *RDR* – "Embracing Methodologists" – talks about the researcher-as-methodologist concept and emphasizes that there is no better time "to grow and gain knowledge" across a wide spectrum of research approaches. Unlike the "old days," when training required

"lots of academic schooling in brick-and-mortar institutions, traveling long (and expensive) distances to conferences, finding time from our work schedules to meet informally with peers to absorb their knowledge, searching for training workshops to learn new methods and techniques, and subscribing to many [print] journals and trade publications to keep us abreast of the latest breakthroughs…"

digital technology and social media offer researchers a "fluid and accessible opportunity" to expand their horizons –

"Twitter and LinkedIn have totally changed the way we communicate with our peers, our clients, and our trade associations. We no longer wait weeks or months between networking events to hear what others are doing in the industry. We no longer need to travel long distances to participate in an educational presentation because countless (generally, free) Webinars are offered to us each week….Our journals and trade publications have been abundantly supplemented with online access, e-versions, as well as blogs and discussion groups of every conceivable stripe. And, if this was not enough, our entire U.S.-centric research world has burst open to embrace the knowledge and perspective of our colleagues across the globe."

The point here is not that researchers need to be proficient in all types of research but rather that pursuing and gaining sufficient knowledge of qualitative and quantitative research has the ability to transform the "qualitative researcher" and the "quantitative researcher" into a "researcher" who wears many hats, is unchained from any one approach, and can be trusted to simply design – from data collection to analysis, reporting, and next steps – the "best" study for the research objective.

Image captured from: http://www.mirus-it.co.uk/blog/8837/

Qualitative Research "Participants" Are Not "Respondents" (& Other Misplaced Concepts From Quantitative Research)

There are many ideas or concepts that a quality approach to qualitative research shares with quantitative research design. Sampling from the target population is one example. Well-crafted techniques to maximize cooperation among recruited participants in order to minimize nonresponse effects are another example. And adequate interviewer/moderator training that provides the necessary skills to mitigate possible bias, while also controlling for participant effects, is yet another example. In fact, there are a number of similar research principles that help guide survey and qualitative research design that positively impact the usefulness of the outcomes.

But to assume that there is a direct relationship between qualitative and quantitative research would be a grave mistake. As discussed in an article posted in 2013 – "10 Distinctive Qualities of Qualitative Research" – the design, implementation, analysis, and interpretation of qualitative research make it unique and uniquely suited to go beyond survey research to study the complexities and meaning of the human experience.

And yet, researchers – both qualitative and quantitative – regularly overextend the applicability of quantitative ideas to qualitative research design. Although survey research informs the researcher of the basic elements of "good research" – and draws the researcher's attention to core criteria dealing with sampling, error, bias, and so on – many quantitative concepts and techniques cannot and *should not* be considered in qualitative research. Here are just four examples:

Generalization. It may seem obvious to most researchers that the limited and highly variable nature of qualitative research makes it a poor predictor of things to come; however, many researchers have advocated the "generalizability" of qualitative data. Whether to further a budding theory or make assertions about an entire population segment, the concept of generalization in the context of qualitative research comes up often. In referring to the case study method, for

instance, Earl Babbie, in his seventh edition of *The Basics of Social Research* (2016), laments "the limited generalizability of what is observed in a single instance of some phenomenon," stating further that "this risk is reduced, however, when more than one case is studied in depth" (p. 312).

Qualitative research does not need generalization to be valuable but it *does* need transferability – i.e., the ability to transfer the qualitative design and/or outcomes to other highly specific contexts. Transferability is discussed in several *Research Design Review* articles, including this one posted in 2013.

Percentages & data graphs. Qualitative researchers have been known to use percentages to report various aspects of their findings (Smith, 2011). There is also a tendency to use graphs or charts of some sort to display the data. Illustrations can be useful to help visualize qualitative data but there is no reason why the researcher needs to fall back on bar graphs or pie charts. Even when no percentages are used – e.g., the histograms of tagged content made available by online discussion platforms – the appearance of a quantitative-like data display not only hints that the researcher believes the qualitative data are quantifiable but also serves to ignore the whole point of qualitative research – i.e., the analysis of context and personal meaning – by reducing the data to a graphical configuration.

"Respondent." The survey respondent is appropriately referred to as a "respondent" because that is exactly the role he or she is playing in the research process. He or she is responding to the researcher's questions which are typically structured and closed-ended in format. Similarly, the qualitative research participant is suitably labeled "participant" because his or her role goes beyond simply replying to a series of questions to encompass participation in the research on many levels. The participant elaborates on the interviewer's/moderator's questions, changes the topic if need be to convey an idea, takes part in a social relationship with the interviewer/moderator, engages with other participants in a focus group discussion, is willingly observed in an ethnographic study, and, in some instances, is asked to aid in the analysis. For all of these reasons (and more), it is research *participants* that provide qualitative data not respondents.

Rotating or randomizing the order of stimuli. The fourth example of a quantitative concept that has been improperly attached to qualitative research pertains to the order in which stimuli – documents, storyboards, images, etc. – are presented to research participants, particularly in the focus group method. There is a 2010 *RDR* post on this topic – see "Standing the Discussion of Rotation in Qualitative Research on its Head" – where the rationale for not rotating stimuli in qualitative is spelled out. The key takeaway from that article is that, unlike

quantitative research design which incorporates various control measures, qualitative research thrives in an uncontrolled environment where the people, geography, and researcher-participant input change within and across research events (e.g., focus groups). This variability is an inevitable component to finding the context and meaning qualitative researchers are looking for, but it also means that making sense of the data and *discerning meaningful differences across segments of the target population* is a very "messy" process.

There is, however, one thing the researcher *can* control that will aid in finding meaningful differences. This is the order in which stimuli are presented to participants from interview to interview or group to group. By keeping the order the same, the researcher can "see" what and how variations emerge. To do otherwise – that is, by rotating the order of stimuli – the researcher has made it impossible to detect meaningful differences across target segments of the population (e.g., Do younger people really feel differently about the stimuli compared to older people?) *and*, unlike survey research, the qualitative researcher cannot say anything about the rotation effect or the order bias that was introduced with each new rotation.

Babbie, E. R. (2016). *The basics of social research* (7th ed.). Cengage learning.

Smith, K. (2011). Anxiety, Knowledge and Help: A Model for How Black and White College Students Search for HIV/AIDS Information on the Internet. *The Qualitative Report*, *16*(1), 103-125. Retrieved from https://nsuworks.nova.edu/tqr/vol16/iss1/6

If I Conduct a Large Qualitative Study with 100 Participants, is it Quantitative Research? Three Big Reasons Why the Answer is "No!"

Too often qualitative researchers present their findings with an assertion along the lines of, 'We conducted 25 focus groups with a total of 250 participants making this study more quantitative than qualitative'; or 'We conducted 10 online bulletin boards with 15 participants in each divided between males and females, so we wound up with good quantitative data'; or 'We planned on conducting 30 qualitative in-depth interviews (IDIs) but extended the research to include 100 interviews so that we can quantify the results.' Unfortunately, comments like these reflect a misguided attempt to equate apples with oranges – lumping them both into the category of "fruit" although their essence – the properties that characterize them – are radically different.

Conducting a lot of qualitative research does not transform it into a quantitative study. To say otherwise, assumes that the only distinguishing factor between a qualitative and quantitative research design is the number of participants or respondents who contribute to the research outcomes. This way of thinking would deem a study conducted with less than 30 individuals as qualitative while something more than that – and certainly more than 100 – as quantitative. Oh, if the workings of research were so simple. Research, like apples and oranges, may all be "fruit" but the essence of design maintains its individuality.

There are three pretty big reasons why a qualitative study of any size or shape will never – or *should* never – be confused with anything remotely looking like quantitative research.

Big Reason #1: By its very nature, qualitative research thrives on the use of unstructured or semi-structured question formats. Unlike survey questions which are highly structured requiring explicit interviewer training so that questions are asked precisely as written, qualitative questioning is typically more relaxed and, though following a topic outline, the researcher will most likely word questions in varying ways as well as introduce new topics as they emerge during the course of

the study. It is this flexible nature of qualitative research that allows for the in-depth, rich input that serves to clarify and contextualize quantitative data. Allowing for new content brings us to Big Reason #2…

Big Reason #2: The content and therefore the context of a qualitative event (e.g., focus group discussion or IDI) will vary from event to event. This is because research participants invariably introduce new ideas or thoughts that the qualitative researcher explores. The introduction of new, not-previously-discussed content creates a unique context within each qualitative event which *ipso facto* serves to shape participants' comments in a discussion or interview to some degree. Along with varying content and contexts, there is a host of other factors that act as variables in qualitative research, which brings us to Big Reason #3…

Big Reason #3: The aggregation of a whole bunch of qualitative research events can never be interpreted as quantitative data because there are simply too many variables at play within any one event. While quantitative research design incorporates certain measures as an attempt to control for an even playing field in the execution stage, the qualitative environment is replete with variables that counter any effort to create a controlled context. Here are just three of the major variables affecting face-to-face qualitative research:

- Venue – In face-to-face research the venue from one focus group discussion or IDI to another continually changes as the moderator/interviewer moves from one research facility or interviewing site to another. Each site has its own aura – emitting from the size of the room, the lighting, the décor, or hospitality of the facility staff – that can impact participants' comfort level and hence their engagement with the research. Whether or not client viewers are present – as well as the *number* of clients viewing – is another contributing variable to the venue impacting the research experience.
- Moderator/interviewer – Even if the same moderator or interviewer conducts all discussions or IDIs, the researcher's particular mood (affecting what and how questions/issues are raised) or style of dress will modify outcomes in some way.
- Show rate – The dynamics – and therefore research findings – will vary dramatically in group discussions (face-to-face or otherwise) depending on: 1) who decides to show up and 2) how many show up. The group composition (i.e., who shows up) in terms of demographics as well as personality types is a key variable that directly affects results. And clearly a discussion with 10 participants will produce a different dynamic as well as quantity and quality of outcomes compared to a discussion with six individuals.

It is curious why any researcher would need to equate their large qualitative study to a quantitative effort. By its very nature, qualitative research design is not intended to be nor does it aspire to become a newfangled version of quantitative. It is not the mere sample size that separates qualitative from quantitative but rather the multifaceted essence of their designs.

Image captured from: http://cobornsdelivers.wordpress.com/2010/02/25/apple-and-oranges-don%E2%80%99t-mix/

Feelings & Sensations:
Where Survey Designs Fail Badly

Survey research is pretty good at allowing people to describe "things" in such a way that the researcher winds up with a fairly accurate idea of the thing being described. The most straight-forward example is a survey question that asks, "Which of the following features came with your new Toyota Corolla?" followed by a list of possible features. However, survey research can also get at descriptions of more experiential phenomena with questions such as, "On a scale from '1' to '5', how does each of the following statements describe your experience in buying a new home?" In these cases, the use of survey methods to research a great number of people, and compile and report the data as efficiently as possible, make good use of closed-ended questions to gain an understanding of respondents' accounts of the "things" of interest. This can also be said of beliefs. Pew's recent survey pertaining to the Christmas story that asked, "Do you believe that Jesus Christ was born to a virgin, or don't you believe this?" is just one example of how a closed-ended survey question – coupled with similar questions related to different aspects of (for example) the Christmas story – can ultimately paint a descriptive portrait of someone's beliefs, religious or otherwise.

But all of these are, to some extent, concrete objects of description – a car, buying a home, a belief (you either believe or don't believe) – that lend themselves to the discreteness associated with closed-ended survey question formats. But what about the nebulous world of *feelings*? Is it possible for the survey researcher to ascertain respondents' feelings – that is, come to a description of what people are actually feeling about a thing, an experience, or belief – by way of these same closed-ended survey question techniques?

Some seem to think so. A major hotel brand has designed a feedback survey asking recent hotel guests to describe their "ideal" hotel by rating various amenities and features such as comfortable furniture and complimentary Wi-Fi. This gives the hotel a decent depiction of a person's "ideal" hotel within the framework of what they can control, e.g., furniture décor and Internet services. The survey design, however, becomes seriously flawed when it goes on to ask, "How well do the

following statements describe how your 'ideal' hotel would make you *feel*?"

Although an admirable research goal – that is, to learn how guests describe, not just the things that make a hotel "ideal" but also, the *feelings* and *sensations* these things arouse – the hotel has taken a wrong turn into the murky waters best traversed by qualitative methods. In this way, the hotel has misunderstood the design limitations of closed-ended survey questionnaire design.

A closer look at the question makes this apparent. The hotel's "feeling" question asks the respondent to rate various statements, including:

- Allows me to live the good life.
- Helps to create good memories.
- Makes me feel calm and peaceful.
- Helps put a smile on my face and makes me feel happy.
- Broadens my horizons and helps me to discover new things.
- And the list goes on…

This question is a lose-lose for both the poor respondent and, more so, the poor researcher who has to deal with the resulting survey data. The respondent clearly has the difficult task of forming context and meaning around the researcher's preconceived virtues of an ideal hotel. This requires lots of cognitive effort, involving multiple soul-searching questions: What is "the good life," what significance does that have for me, and what relevance does that have for me in choosing a hotel? Or, I am not sure what is meant by "horizons" and how horizons are broadened, is that the same as discovering "new things," and what are the new things that an ideal hotel could help me discover?

For the survey researcher, this question is even more complex. Assuming that the sole purpose of the question is not for marketing purposes, e.g., an advertising campaign to position the hotel as a sanctuary for those seeking "the good life," the person having to analyze this survey data and *operationalize* it in order to reach useful conclusions is left powerless. While the researcher may have his or her own concept of what "the good life" or "good memories" mean, there is no way *in a closed-ended survey question format* that the researcher can begin to make meaning from this data.

Capturing feelings and sensations in order to capture "real," personal experiences is a necessary and important goal of research with human beings. Yet, it is qualitative research methods – not closed-ended survey designs – that allow researchers to tap into those often elusive inner experiences.

Image captured from: http://izismile.com/2013/04/08/a_majestic_african_hotel_experience_in_kenya_21_pics.html

"What the heck is this?" Calming the Fears of Qualitative Research

Through history, research people have discussed and debated the virtues and fallibilities of quantitative versus qualitative research. "Versus" because there is typically a 'one or the other' mentality in thinking and talking about quantitative and qualitative research that may ultimately pit one against the other. This dichotomy makes obvious sense from the standpoint of the very different purposes and approaches prescribed by these two research genres, fostering as it often does two very different types of researchers with sometimes radically different mind and skill sets.

There are situations — we can all probably think of some — when a survey or focus group (or IDI or observation) research design is opted for simply because it is the type of research that falls within someone's comfort zone. We go with what we know. This is true of researchers; it is also true of corporate clients and other research funders.

Many qualitative researchers, for instance, are loath to venture into survey territory where the stark realities of black and white numbers, percentages, and correlations are too confining as they are mind-blowing. And it is usually this qualitative-fear-of-quantitative that we hear so much about. But what about survey researchers and the clients who find a safe haven in quantitative methods? Do they share a similar dread of qualitative research and, if so, why?

Answer: Yes they do, because qualitative research is messy and messiness is a scary thing if you don't know what to do with it.

I am not talking about a fear of messiness from a left brain-right brain standpoint — the idea that qualitative demands greater right-brain thinking as it delves into reading emotions compared to the logic of critical reasoning in survey research — but rather a genuine fear of not knowing how to approach, much less analyze, the tangled convolution of real life embraced by qualitative research.

Evidence of this is found everywhere. It is found among research clients who are enthralled by the volume of rich feedback provided by online bulletin boards but are at a loss to know what it really means; or survey researchers who shy away

from a qualitative approach to a highly personal, emotional research issue because they fear they are incapable of making sense of the data; or client-observers at a focus group discussion who define their takeaway from the first provocative statement made by a group participant because they haven't been educated on the discussion as a research method and how to properly listen to and understand the outcomes; or quantitative researchers who are scared off from the inductive analytical approach in qualitative research that appears to be a mere "fishing expedition"; or the client who listens to a batch of IDIs and comes away confused by the seemingly disconnected thoughts, concluding that the whole research effort has been a waste of time.

In every case, the researcher/client who defines "research" through quantitative-tinted glasses looks at qualitative research and is left asking, "What the heck is this?" The onus is on qualitative researchers to address this question by calming the fear of the unknown and making qualitative research approachable as well as ultimately more usable. Qualitative researchers can begin by:

- **Doing more in preparing the funder and/or user of the research** on what to expect from qualitative research — i.e., the apparent discontinuities, inconsistencies, and irrational thinking — by promoting the realness of qualitative research along with the idea that it is a good thing when responses don't follow a straight line from point 'A' to point 'B' because that is what conducting research with human beings is all about.
- **Explaining why a discussion or interview guide is designed the way it is**, why topical areas and related questions are formatted a certain way or are in a certain sequence. For example, the moderator should go through the guide with those who will be observing (or listening to) a focus group explaining the importance of each area, saying "Now, in this section I would like you to be listening for…" and "Responses to this section will allow us to better understand participants' thinking when we get to the last section of the guide."
- **Conducting better debriefs**. Unless the researcher (interviewer, moderator, observer) takes the initiative to conduct a thorough debrief, the client/funder/user of the research is left to his or her own (misguided) interpretations. Proper debriefs are an important part of the education process.
- **Explaining the analytical process**. Many people who request and ultimately use qualitative research are not knowledgeable about what goes into analysis. Not having done it themselves (or only on a cursory level) they are not informed about this process and how the researcher's interpretations are not the product of any one thing but a multiplicity of

variables within the data. This should pose another opportunity for the researcher to promote and educate the users of the research on how and why qualitative research is done.

- **Connecting the dots in the final research document**. This requires the researcher to resist the frequent request for a whittled-down version of the outcomes in a colorful yet wanting PowerPoint slideshow. Instead of a colorful graphic, the researcher's job is to explain the analysis that was conducted, the complexity of the data and how each piece connects with another piece (or does not), and the nuanced story that lies within.

Qualitative Research: Using Empathy to Reveal "More Real" & Less Biased Data

The fourth edition of Michael Quinn Patton's book *Qualitative Research & Evaluation Methods* is a big book — over 800 pages — with updated and new content from earlier editions, including something he calls "ruminations" which are highlighted sections in each chapter that present Patton's commentary and reflections on issues that have "persistently engaged, sometimes annoyed" him throughout his long career in qualitative research. Patton has made some of these ruminations available online via his posts on the betterevaluation.org blog.

In his November 14, 2014 post, Patton shares his "Rumination #2: Confusing empathy with bias." In it, he raises an important issue — having to do with the personal nature of qualitative research and how that impacts data collection — that, on some level, runs through the qualitative-quantitative debates waged by researchers who argue for one form of research over another. Such a debate might involve a survey researcher who, entrenched in statistical analysis, wonders, 'What is the legitimate value of qualitative methods given its focus on the convoluted intricacies of feelings and behavior which are often conveyed by way of others' nebulous stories?' All of this convoluted interconnectedness is enough to stymie some quantitative researchers, and yet it is the stuff — it is the *juice* — that fuels the qualitative approach.

Is "getting close" to research participants by truly empathizing with their life situations — or sincerely trying to understand what they are saying in response to questions by "walking in their shoes" — interjecting bias that damages the final outcomes leading to false interpretations of the data? And if that is the case, what is the justification for qualitative research in the first place? After all, if its "juice" is the personal connections researchers make by way of empathizing with participants yet it is this empathy that makes the results suspect; well, it is no wonder that there are some who perpetuate the qualitative-quantitative debates.

All research with human beings is about the human experience. All research is designed to tap into what it means to have a certain experience – regardless if that

experience is a fleeting thought, a sensation, a sharp attitude, an impulse, or deliberate behavior. *Qualitative* research celebrates the humanness of these experiences. By rooting out the personal connections that are the essence of these experiences, qualitative research methods animate the thought, the sensation, or the impulse behavior in order to expose the experience for what it truly is. In this way, the experience has been laid bare for all to see.

It is precisely because of their empathy – the ability to observe and listen from the participant's standpoint – that qualitative researchers routinely uncover how people think, revealing the interconnectivity that brings meaning to the experiences that lie at the center of their research. This level of meaning – this laying bare of the connections – gives the researcher an unfiltered view of the human experience which, some could argue, seems "truer" and "more real" – that is, less *biased* – than survey data based on forced responses to closed-ended questions.

So, empathy is good. Empathy enables the researcher to come to terms with how *other* people think by thinking like them; which may, at the same time, provide clarity and actually *reduce* a form of bias in the data. Indeed, empathy may be the essential ingredient lacking in survey research to release the pent-up bias inherent in data that stems from the failure to look for (and make) the connections that define the human experience.

Image captured from http://berkozturk.deviantart.com/art/empathy-211500476

Qualitative Research & Thinking About How People Think

Whether we know it or not researchers are always thinking about how people think. Whether it is explicit or implicit in our work, we are thinking about how people think from the very beginning — the conceptualization of research design — through to the very end — the analysis and interpretation of research findings. Everything we do, really, is about matching research techniques, question design, fieldwork protocols, data coding, and final analysis with the reality of how people think — Will people be more forthcoming regarding sensitive issues in an online survey than a telephone interview? Do people respond differently if we ask a question about "gay men & lesbians" versus "homosexuals"? Will respondents or potential focus group participants self-select out of a study if the interviewer inadvertently mentions the controversial nature of the interview in the first moments of the introduction? How are the coders interpreting open-end comments? – Will one coder code "I would like more pulp in the orange juice I buy" as 'need to improve quality' or as 'need to improve taste' or create a new code specific to pulp? And, when the data or discussions/interviews are ready for analysis, how do we translate the integration of various aspects of the findings into usable next steps for the end-user?

Quantitative researchers have openly discussed how people think for some time. Tourangeau, Rips, & Rasinski (2000), Sudman, Bradburn, & Schwarz (1996), and Bradburn, Sudman, and Wansink (2004) are just a few examples of the researchers who have written extensively on cognitive psychological principles related to survey methods. But I am left wondering, 'where are similar treatises in the commercial qualitative marketing research world?' If cognitive principles apply in the quantitative realm then surely they apply to research forms devoted to in-depth conversations and elaborate probes that ladder to key benefits in the qualitative arena.

I would argue that cognitive-process theories are as relevant and important to qualitative marketing research as they are to quantitative. For example, let's look at optimization[1] and satisficing[1] as it relates to the presentation of stimuli in a focus group context. Tourangeau et al., (2000) and others have espoused a basic four-step cognitive-process model to discuss how research participants respond to questions optimally: 1) interpreting the question to deduce its intent; 2) searching the memory for relevant information; 3) integrating that information into a judgment; and, 4) translating that judgment into a response. The fact that focus group studies typically involve a limited number of stimuli and moderators' guides

are designed to take participants through this cognitive process by motivating thoughtful responses strongly argues for the idea that optimization, not satisficing, is at play in these research settings. Similarly, the likelihood of research participants opting for a response that is "good enough," or satisficing, is greatly reduced. Applied to the use of concept boards and other stimuli in focus groups, one could argue that the concept of primacy and recency effects are irrelevant in focus group research and, while randomizing the presentation order of stimuli is de rigueur in quantitative, not necessarily so in qualitative. To the contrary, there is an argument to be made that not randomizing across group sessions adds a necessary component of control.

So, what do you think? What do you see as the role of cognitive-process theories in qualitative marketing research? A contribution to this discussion is most welcomed.

[1] Optimization and satisficing refer to the extent respondents "perform the necessary cognitive tasks" to answer research questions. In the former, respondents exert the effort to thoroughly comprehend and weigh response choices in order to select the optimal answer; in contrast, respondents who satisfice "may compromise their standards and expend less energy…Instead of generating the most accurate answers…[they] settle for merely satisfactory ones." [quoted statements taken from Krosnick, J.A. 1999. Survey research. *Annual Review of Psychology*, 50, 537-567]

Reference

Tourangeau, R., Rips, L., & Rasinski, K. 2000. *The Psychology of Survey Response*. Cambridge University Press.

Error in (Qualitative) Research

It should be obvious from my earlier posts that I am a big believer in the idea that research design is governed by core principles that apply to everything we do. I believe that it is not good enough to be a qualitative researcher or a quantitative researcher or an online researcher or an ethnographer or whatever. That, regardless of our mode or technique, we are obligated as researchers to practice "good research" defined by adhering to basic tenets that we all should have learned in school. Unfortunately, college marketing research courses may fuel silo thinking in research design by organizing in-class discussions around research "classifications" rather than focusing on the discipline of research itself. It might not be a bad thing if students of marketing research were required to take research methods classes across fields – such as psychology, sociology, and political science – to gain an appreciation for the fundamentals of this thing we call "research." In this respect I have often thought that I would like to come back in another life as a methodologist. Not too dissimilar from what Bill Neal of SDR discussed back in 1998[a], i.e., as someone who has "specific education in, and knowledge of, a variety of converging disciplines" that would enable me to evaluate and craft efficient, powerful research designs. I published a short article on the idea of qualitative researchers as methodologists in 2001. I am nothing if not consistent.

What I really want to talk about is error. The preceding remarks were not so much a diversion as a reminder that, yes, it is okay to talk about error in the qualitative as well as the quantitative realm.

Both quantitative and qualitative research designs are typically shaped to ensure that responses to research questions are heard correctly and to improve the accuracy of analyses. The potential for achieving both these aims – accuracy in response interpretation and analysis – is realized to the extent that certain parameters are utilized in the conduct of the research. Quantitative studies, because of the structured design, can control for or logically theorize about sampling and non-sampling errors. Errors in qualitative research, on the other hand, are not as easily seen, yet they exist to a high degree and are often willingly introduced by the researcher. Knowing that error exists in (for example) focus group research is problematic because all researchers aim for confidence in their findings. Being highly aware of error introduced by convenience samples, as well as non-sampling errors (such as interviewer and selection bias in recruiting, moderator and response bias in the discussions themselves), qualitative researchers build in measures to control error in their selection and interviewing procedures

similar to their quantitative colleagues (e.g., questionnaire design protocol in recruiting screeners, properly trained recruiting interviewers, non-leading interview techniques).

The notion of error in qualitative marketing research is rarely discussed but a concept worth exploring. Without it, qualitative research is weakened under scrutiny and simply becomes an exercise where all ideas are "good ideas," where individual differences do not matter, and where all responses to qualitative questions are legitimate. Some might go further and say that focus group research devolves into a haphazard process of ransacking the moderator's projective toolbox. If this were true (which it is not), researchers wouldn't incorporate any controls into their qualitative research designs or care too deeply about analysis. But as researchers we *do* care about the design and analytical elements of our qualitative research because we care about the transparency of the processes and the degree of confidence by which we can report study findings.

Error – controls – transparency – confidence in results. These are all issues that I come back to time and again. Am I building my own list of core research principles?

Reference

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Respondents & Participants Help Us, Do We Help Them?

This is in defense of the most important person in the research process. This is in

defense of the person who, without his or her participation, there would be no research. This is in defense of the individual who caves to our pleas, posturing, and creative bribes and agrees to be a survey respondent or qualitative participant. We think a lot about this person at the beginning stages of our research, spending considerable thought designing effective invitations and introductions. We struggle with variations in our language and weigh incentive options hoping to maximize interest and involvement –

"There are only 10 questions, and it should take you about 3-5 minutes."

"So that we can continue to improve the experience, we invite you to take a survey about the event."

"In return for your time, we will make a donation to the charity of your choosing."

Research on research has examined other approaches to invitations and introductions – such as the experiment by Edith de Leeuw and Joop Hox testing the inclusion of "I am not selling anything" in telephone introductions – and, back in the early 1990's, qualitative researcher Alice Rodgers explored key aspects in the recruiting interview that motivate focus group participation.

But I am concerned that our interest in a particular segment of the population may only go as far as gaining a completed questionnaire or group participation while focused on minimizing nonresponse. I am concerned that we selfishly look upon the respondent/participant as someone who can help *us*, not in how we can help *them*. And yet that is the explicit or implicit promise we have made in coaxing cooperation – you do this for me (take part in my study) and I will do this for you (make your life better by aiding in the development of new or improved services, products, or experiences that you care about). This is the contract that researchers enter into with their respondents/participants. Every research effort carries with it this obligation.

While we are obligated to our participants in many ways, there is probably no other point in the research process when we owe so much as in the analytical phase. Analysis is our pay-back time; when methodical, thoughtful analyses result in coherent, well-told stories of the relevant reality – of what has been, what is, and what could be. Short of that, we have abused the 'welcome mat' respondents have laid before us as they opened the door into some aspect of their lives.

I am reminded of this obligation when I read a report filled with all the data and pertinent comments from the research study yet it is devoid of the connections within and across data that provide the insight needed to move forward in any meaningful way. I was recently asked to review two such documents – one reporting on a quantitative survey, one on a qualitative study. In each case, the researcher provided a 'data dump' – everything was reported, every response to every question, with charts & graphs, and verbatims sprinkled throughout. The conclusions and recommendations in both reports were based on a superficial (topline) read of varying, seemingly conflicting, responses leaving the reader with a rather empty (what did it all mean?) feeling. Maybe the responses were not conflicting, maybe there was an underlying theme that connected them, we will never know. I came away from each report brokenhearted in the knowledge that another story had been lost, another obligation had been shattered.

We may have little or no control over how (or if) research sponsors actually use our research findings but that doesn't excuse us from the responsibility we have taken on. Our duty is to collect data, record responses, and then enter into the analysis with a deep sense of indebtedness, with the goal of discovering and telling the participant's story. Everything we do is ultimately about the people who help us so that we can try to help them.

Image captured from: http://aldianews.com/articles/opinion/op-ed-only-true-solidarity-can-give-meaning-hispanic-heritage-month/50000

Can We Reduce Gender Differences in Qualitative Research?

As part of her dissertation for her PhD at Pennsylvania State University in 2011, Rebekah Young looked at "don't know" (DK) survey responses, specifically how the incidence of DK responses varies by demographic segments. Looking across 12 nationally-representative datasets, 354 questions, and responses from more than 23,000 respondents, Young determined that, among other things, men were less likely to give a DK response than women.

While Young's findings are not news (i.e., they are supported by existing literature), her work left me wondering about gender differences in qualitative research. Specifically, whether there is a propensity in men to voice informed answers to a moderator's questions even when the simpler, more appropriate response should be, "I don't know." Likewise, I wonder how often women cave with a DK rejoinder when they actually harbor knowledge or experience that could further insights from the research.

This gets more interesting when you consider the research subject matter because the likelihood of non-response in our qualitative research may depend on the topic of discussion. Men, it turns out, are more likely to voice "don't know" around "sensitive questions" (e.g., sexual activity) while women are less likely to give a DK response when the discussion topic is "family and friends." At least in the survey research Young looked at. But do these types of gender differences exist in the qualitative arena as well?

I have plenty of colleagues who argue that mixed-gender focus group discussions never "work" because of the competing dynamics generated from the pure nature of psychological, emotional, and physical male-female differences. Yet I have rarely hesitated to combine men and women in a multi-person qualitative session on a non-sensitive topic. This makes my work more difficult – teasing out what someone *really* thinks, stripped of all possible gender-related sources of error – but it also makes it more real. It is more real because, after all, men and women do live together in some context in the real world, and the gender dynamic is often an important sight to behold, lending a new dimension to our understanding of the research.

In consumer research, home improvement, do-it-yourself studies are a case in point. Many years ago, this was primarily a man's world but women quickly entered this market and, in my experience, have as much if not more to say about selection, purchase, and use of building materials than men. These focus groups are typically very vocal and full of energy, with everyone (both men and women) sparked by their mutual interest in the topic (home improvement). Are men more likely to contribute (less likely to say "don't know") in this traditionally-male topic of discussion while drowning out their female counterparts? This is when the effective skills of a trained moderator come into play.

In the end, and in contrast to survey research, maybe the ability to reduce gender-response differences in the qualitative environment is a challenging but real benefit to our qualitative work.

Employee Research: 6 Reasons Why It Is Different Than Other Research Designs

The following is adapted from an article that ran in Quirk's e-newsletter June 2010.

Employees are vital to any successful company yet the importance of employee satisfaction research is often overlooked. Employee research – conducted within large or small organizations – is critical to maintaining a fine-tuned business engine where morale is high, turnover is minimal, and top-quality productivity hums along throughout the firm. The company that understands the significance of employee research is not only rewarded by a content and stable workforce but a profitable bottom line along with a growing return on investment.

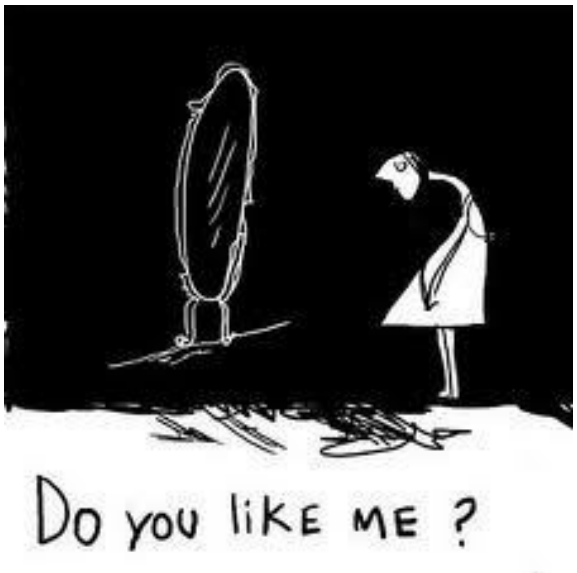
Conducting employee research is in a class all its own. Asking consumers to confess their brand preference or convincing business customers to divulge their vendor selection process is one thing, but asking employees to reveal little-known opinions about their jobs – their *life source* – is a risky business. What makes employee research "risky" becomes apparent when confronted by a number of employee-specific issues in the design of a qualitative or quantitative study. Here are six unique design considerations in employee research:

- **Prior notification** – via email, intranet, company bulletin board or newsletter – dispels doubts and cynicism while minimizing refusals and nonresponse. To instill credence and maximize impact, the notification should come from someone in management who is far up in the chain of command yet carries a name that is easily recognized (*and respected*) by employees. In some instances, this means the president or CEO of the company, in others it may mean the department head. The important thing is to get employees' attention and gain trust in the research.
- **All relevant management should be made aware of the research** in order to create an informed and supportive frame around the research within the company. This gives employees added assurance that the research is legitimate and important to the client company, which adds another brick to the foundation of trust.
- **Cooperation** among non-management employees may be low (even with prior notification). Management will participate in the research as a sense of duty (as part of their job description); but non-management tends to be more

skeptical, questioning the real benefit of participation, and more likely to wonder 'what's in it for me?' Understanding the varying degrees of cooperation by employee position – as well as by job function or department – will dictate the inclusion of certain design features as well as the success of the study.

- **A client contact name/email or number** should be given during initial fieldwork so that employees have the option of verifying the authenticity of the research study. Even with prior notification and highly-sensitive fieldwork, there will be employees who remain skeptical. Left on their own, employees may question their immediate boss about the research who may or may not be able to answer the employee's questions. By proactively giving employees a name and email address (and/or phone number), effectively funnels employees' concerns to the appropriate person within the company while reinforcing the trustworthiness of the research effort.
- **DIY fieldwork is a no-no.** The absence of direct client engagement with the fieldwork is important to maintaining employee anonymity, establishing trust between researcher and employee, and gaining honest input. Although it is a good thing to have a staff contact within the organization to legitimize the research, a third-party provider should be used for the actual fieldwork. This means using outside recruiters/facility/interviewers for face-to-face qualitative studies and professional research firms for online/phone/mobile/mail/CLT projects. DIY research (the rage in this economy!) is especially a no-no with respect to employee research.
- **Reporting and follow-through require special attention.** It is not good enough to submit a written report and hope that someone will act on the research findings. Employees demand serious consideration of their suggestions. They want to know the status of the research results and how their input is impacting corporate policies. For this reason, the corporate communications department is an integral player in all employee research efforts. By communicating research findings, the company is saying to employees, 'We care about what you think, we are listening, and we are prepared to take action.' This is just another vehicle by which the client company builds trust among its employees, makes the workforce feel good about their employer, and encourages them to participate in future employee research.

Accounting for Social Desirability Bias in Online Research



An article posted back in 2011 in *Research Design Review* — "13 Factors Impacting the Quality of Qualitative Research" — delineated three broad areas and 13 specific components of qualitative research design that can influence the quality of research outcomes. One factor, under the broad category of "The Environment," is the "presence of observers/interviewers as well as other participants." In other words, how does the inclusion of other people — whether it be client observers, interviewers, fellow participants, videographers, or note takers — affect the attitudes, behaviors, and responses we gain from our research efforts? Does research, almost by definition, create an artificial social context where participants/respondents seek others' approval leading to a false understanding of their realities?

Social desirability bias is not a new concern in research design and its influence on the ultimate usefulness of our qualitative and quantitative research has been the focus of attention for quite some time. Tourangeau, Rips, and Rasinski (2000) discuss social desirability in the context of sensitive questions:

"[The] notion of sensitive questions presupposes that respondents believe there are norms defining desirable attitudes and behaviors, and that they are concerned enough about these norms to distort their answers to avoid presenting themselves in an unfavorable light."

Nancarrow and Brace — in their article "Saying the 'right thing': Coping with social desirability in marketing research" (2000) — address the under- and over-reporting associated with social desirability bias and outline numerous techniques that have been used to deal with the problem — e.g., emphasizing the need for honesty, promises of confidentiality, and question manipulation by softening the suggestion that the respondent *should* know the answer to a particular question or behave in certain way.

Online technology and the ever-growing online research designs that are emerging — within social media, mobile, bulletin boards, communities, and survey research — have allayed social-desirability concerns. The belief among some researchers is that one of the beauties of the virtual world is that inhabitants basically live in solitude, stating that a key advantage to online qualitative research, for instance, is the obliteration of social desirability bias and hence the heightened validity of online vs. offline designs*.

The idea that researchers who design online studies can ignore potential bias due to social desirability seems misguided. In fact, a good case can be made that the Internet and online technology have unleashed a dynamic capacity for posturing and the need for approval. Popularity and even celebrity – so elusive to the everyday person in earlier times — have become preoccupations. You only need to witness the apparent race for Facebook friends, LinkedIn connections, Twitter followers, and YouTube or blog views – as well as the "vanity" and online self-publishing craze — to gain some insight into the potential competitiveness — i.e., pursuit of social stature — fueled by the realm of online. In this way, the virtual social environment has encouraged a look-at-me way of thinking and behaving.

So, how real are those at-the-moment snippets transmitted by mobile research participants (which may be meant to impress the researcher more than inform)? How honest are those product reviews or blog comments? What is the extent of bravado being exhibited in our online communities, bulletin boards, and social network exchanges? The answer is we do not know, and yet it doesn't take a great leap of faith to acknowledge that the individual attitudes and behavior we capture online are potentially distorted by an underlying need for social approval.

To paraphrase Mark Twain, the reports of the death of social desirability bias in online research are greatly exaggerated; and, to the contrary, social needs have blossomed in the online world. More than ever, people are asking, "Do you like me?" and, in doing so, presenting the researcher with a critical design issue that impacts the quality of our outcomes.

* https://www.greenbook.org/marketing-research/social-media-opportunities-for-market-research-37076

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Striking a Balance in Research Design

One of the healthy outcomes from the rise of social media and mobile research is that it has brought to the forefront the issue of the balance of power – or control – in research design. Method specialists who are proponents of social media or mobile research often assert that a big advantage of these approaches is that the participant, not the researcher, controls what is shared or not shared. Qualitative researchers, for example, have discovered the value of Pinterest where, without any researcher involvement, they surmise the hobbies and characteristics of individuals that represent some segment of the population. And a mobile qualitative research study empowers the participant to select when, where, and how (in what format) information is provided to the researcher. The researcher may start with a few basic questions but it is the research participant (knowingly or not) who controls the input.

This participant-leaning balance of power is in contrast to other qualitative research – face-to-face focus groups and in-depth interviews – as well as quantitative survey research where the researcher drives the course for the research with carefully-considered questions and projective exercises.

A RDR post back in November 2012 talked about the balance of power as it relates to interviewer bias and the importance of reflexivity in qualitative designs. This post states that "the greatest threat" to our qualitative research is "the social interaction component of the interviewer-interviewee relationship" – specifically, the asymmetrical balance of power or control that is tipped in favor of the interviewer/moderator/researcher who typically holds most of the cards, dealing them out to research participants per a predetermined topical question guide. And certainly this extends to the quantitative realm where, regardless of mode (telephone, online, mail, mobile), the survey researcher calls the shots, leaving the respondent with sometimes the unenviable task of responding to long questionnaires filled with questions that are difficult to answer (see the "I wonder about God" post).

The degree of control that the researcher or the participant/respondent is given in a research design is important. It is important because it not only impacts the integrity of the data (input from the participant/respondent) but also the quality of

the researcher's analysis and interpretation of the outcomes and, therefore, the usefulness of the research as a whole.

For the social media and mobile researcher to give up control to the participant is folly, or at least not research. What is "research" if it is not a disciplined endeavor that systematically examines some aspect of how people think to gain knowledge in a broader context? So, compiling images that participants share in a mobile qualitative study is interesting, "in the moment" feedback, but can we call it "research" in the true sense?

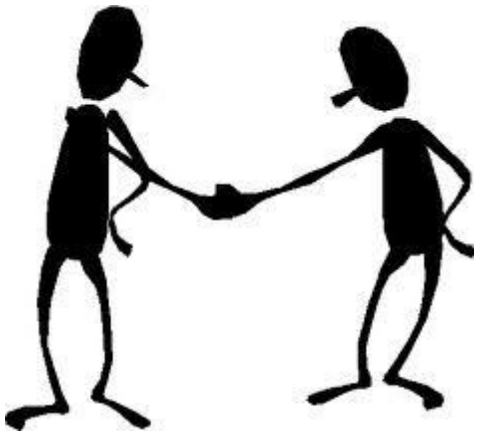
And yet, one only needs to consider those long, tedious questionnaire designs to realize that the researcher-in-control model of survey research may not be the answer either.

It is a good thing that the modern age of research methods has brought new life to research design, shining a light on the balance of power. Researchers of all kinds will hopefully give more consideration to power or control in their designs (who has it, who doesn't) and think about how to create a balance that maintains the systematic discipline of research while giving a greater role to participants/respondents. Designs, for example, that are not unlike those in usability testing where equilibrium is struck allowing the respondent to guide but the researcher to question.

Image captured from: https://pro.psychcentral.com/changing-the-balance-of-power-in-relationships/009297.html

As Researchers, We're All After the Same Thing

If you are one of those researchers who work in both quantitative and qualitative design, something you are reminded of fairly quickly at the AAPOR annual conference – currently being held in Boston – is that there is really little separating the two genres. Survey researchers may deem the 'hard facts' of their quantitative data as a gold standard of sorts; and qualitative researchers may look questioningly at the righteousness of these 'hard facts', asking "Where's the beef?" that explains the "why" behind the data, but there is no debate that we are all after the same thing. The following are just a few of the common areas of interest among quantitative and qualitative researchers:



- **Question administration** – What to ask & how to ask it
- **Interviewer effect** – Impact of interviewer's behavior, appearance, & attitude on response
- **Mode** – Which mode for which population segment & its impact on response
- **Cooperation** – How to increase participation & decrease respondent/participant burden
- **Analysis** – How to organize data & develop coding schemes that accurately represent the data
- **Cost** – How to "do more" with smaller research budgets

And, interestingly, researchers of all stripes are addressing similar issues within each of these areas, such as:

Question administration –

- What role does context – question context &/or physical environment – play in response?
- How does conversational interviewing affect response?
- How do you avoid "crummy" questions such as the one posed by Jack Fowler, Jr., PhD, the 2013 AAPOR Award winner in his acceptance speech tonight – 'How often do you buckle your seat belt when sitting in the backseat of a car?' (Hint: It is a double-barrel question)

Interviewer effect –

- What effect do the interviewer's probing questions have on response?
- How does the moderator's appearance alter a face-to-face discussion?

Mode –

- How does the mode impact interviewer-participant rapport & interaction?
- What effect will choice of mode have on the particular study population?
- Which is the "best" mode for sensitive topics?

Cooperation –

- What are the most effective recruitment strategies to gain cooperation?
- What role does incentive – amount & type – play in gaining cooperation?

Analysis –

- What is the best inductive approach for this particular study?
- Is the interpretation of the data supported by the analytical process?

Cost –

- What are the tradeoffs between opting for a less expensive approach?
- If the incentive is decreased, what will this do to cooperation?

There is, however, one important difference. It is a difference that rings loudly while sitting at AAPOR listening to the work of these mostly quantitative researchers. And that difference, of course, is that the survey folks grapple with these issues head on. They experiment and test and look at the myriad of design issues upside down and sideways, always searching for ways to tweak their designs in order to achieve more reliable projectable outcomes. Qualitative research never will and never should be about projectable or reliable outcomes but there are any number of ways that qualitative researchers could be learning more about the effectiveness of their designs and the realities of their findings. The art of question design, behavioral coding, selection bias, and non-response – these and so much more should be fertile areas for qualitative researchers to explore in their work with the goal of producing research that is credible, analyzable, transparent, and ultimately useful. These are the quality components that all researchers can agree on.

"Tell Me What Happened" & Other Stories

Storytelling is the ultimate goal of all research. In the end, researchers of all kinds are in the business of understanding how people think, and what better way than to hear their stories. Storytelling may sound like something only qualitative researchers should care about but survey researchers, knowingly or not, are equally concerned about the stories people have to tell. The brouhaha over Gallup's failure to correctly predict the winner of the 2012 presidential election is a case in point. One of the fundamental weaknesses that contributed to the Gallup polls favoring a Romney win is how Gallup went about determining likely voters, including respondents' past voting behavior and how much attention they were paying to the election. Like all pollsters, Gallup simply used the responses to these and other questions to calculate which respondents were most likely to vote in the national election. One of the problems that Gallup ran into, however, is that "many" of the Obama voters claimed not to be paying much attention to the election which, of course, disqualified them as likely voters. In essence, Gallup simply wanted to know each respondent's story pertaining to their likelihood of voting but instead built a model on misguided closed-ended questions. Who knows? Maybe the stories from one question – "Tell me how you feel about voting in the presidential election." – would have allowed Gallup to more accurately isolate likely voters.

"Tell me what happened when you joined the Army." "Tell me about your professional life." "Tell me how you became a regular coffee drinker." These are the inquiries of narrative research. The narrative researcher is focused on participants' stories – what they say, how they say it, why they say it, and the context in which they say it. In narrative research, the story *is* the data. The story is not a vehicle by which to convey meaning from in-depth interviews or group discussions (for example), or provide anecdotal accounts of observations. Rather, the story is the focus, and only by taking in a holistic view of the narrative can the researcher truly interpret the outcomes. By definition, this holistic approach mandates a story told not just by way of a single method but by a variety of methods that serve to complete the "narrative environment." Susan Chase (2011) for instance, writes about her study of diversity issues at "City University" and how her understanding of the narrative environment was informed by way of interviews, observations, and content analyses of college publications, the curriculum, and the website.

Everybody loves a good story. But a good story is not worth much in the land of research without a plan for analysis. A good story is just a form of entertainment – something we amuse our clients with to pique their interest in what we do – unless the researcher designs an analytical approach that keeps the story intact while addressing research objectives. Catherine Riessman talks about thematic analysis ("what" is said), structural analysis ("how" it is said), dialogic/performance analysis ("who" it is said to, "when," and "why"), and, when visual images are involved, visual analysis (conducted by applying the other analytical schemes). Whatever the strategy for analysis, what is important is that the narrative be understood in its entirety, with the understanding that "stories don't fall from the sky" (Riessman, 2008) but rather are ensconced in the contexts, complexities, and circumstances of the narrator.

Narrative research reminds researchers of the pesky inconvenient truth that research data that lies in a vacuum – stripped of its context, supporting evidence, and interpretation – is pretty pointless. Moderators may engage their group participants with story-telling exercises – "Tell us about the first time you went skydiving." – that are fun for those on both sides of the mirror, and pollsters may continue to label likely voters by way of a series of closed-ended questions and algorithms, but only a holistic account of the story that is waiting to be told and an honest analysis of the story as data will give the researcher what storytelling can do so well – an understanding of how people think.

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Listening: A Lesson from "New" Coke

In 2013, Susan Eliot posted a terrific piece on listening (a common theme on her blog *The Listening Resource**) titled "Listening For Versus Collecting Data." In it, she talks about the power imbalance – and, I would add, the insensitive mindset – implied by the idea that researchers are "collecting data from subjects" compared to the more useful notion that we are listening "one human to another." Eliot goes on to cite Martin Buber and his distinction of I-Thou and I-It interactions or relationships between people, with Eliot stating "When we look upon the other person as a 'thou' (a unique, sentient human being) rather than an 'it' (a data repository), we approach the research with a humanistic perspective, one that is likely to net us rich and meaningful data."

Extolling the virtues of listening seems almost trite (we all claim to "listen" in some shape or form) yet why is it so difficult? It is difficult, not only among researchers where listening is (should be) a required skill but, among all of us where listening is a fundamental component of human interaction.

The October 18, 2013 *NPR TED Radio Hour* program "Haves and Have-Nots" presents two important examples on the importance of listening and, more particularly, the negative effects of not listening well. The first is a TED talk given by Ernesto Sirolli titled "Want to help someone? Shut up and listen!" where he tells the story of an ill-fated attempt to teach people in Zambia how to grow food. Rather than entering the Zambian community with an open mind and listening ears, the aid workers went about trying to "save" the Zambian people with their preconceived notions of what that means. One result was the planting of crops that were subsequently eaten by 200 hippos. Rather than listening to the needs and knowledge of the local people, these Italian aid workers simply made the kinds of decisions they would make back home in Italy. It was from here that Sirolli developed the Enterprise Facilitation economic development system which is a person-centered approach based on the concept of actively listening to the "local passion" rather than attempting to instigate foreign solutions.

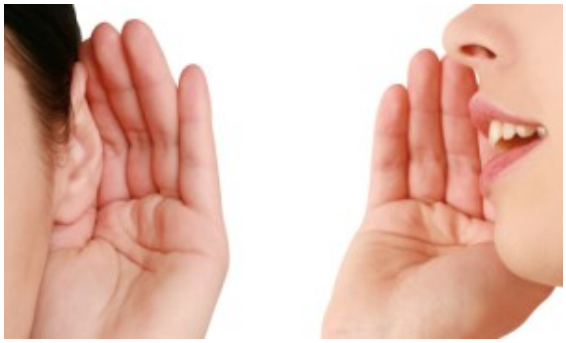
The second example comes from Jacqueline Novogratz and her talk on "Patient Capitalism." Again, it is a story of trying to "save" the African people by way of preconceived ideas on how that should be done rather than allowing the local people to develop and define what "saving" means in their situation. Once more, listening is the key; with Novogratz, like Sirolli (who wondered why the Zambian people had allowed them to grow crops only to be eaten by nearby hippos and was told "You never asked."), emphasizing the important point that effective listening revolves around asking the right questions. Novogratz relates the story of helping local women run a bakery and the decision of what color to paint the bakery building and its surrounds. When she did not get any input from these women, she elected to paint the bakery the color blue. Only after it was completed and the question was asked did one woman say, 'Well, our color is really green.' From this, Novogratz states, "I learned that listening is not only about waiting [for people to say what is on their minds] but it is also learning about how better to ask questions."

This is why listening is at the core of all research with human beings. Because listening is, not just about patience and open-mindedness but, equally about asking "better" questions, it is as relevant to survey research designs as it is to qualitative methods. Listening goes beyond the end product – e.g., a response to the researcher's question – and encompasses the manner and substance of the questions themselves. Just ask Coca-Cola. In making the disastrous decision in 1985 to introduce the "new" Coke after conducting extensive – qualitative and quantitative – research, they quickly understood that they had failed to ask (*and listen for the answer to*) one important research question, 'How would you feel if the current Coke product was no longer available in the marketplace?' A "classic" case, you might say, of a research design in need of a comprehensive listening strategy.

*This blog is no longer available.

Giving Research Participants a Clue (& helping them be "better" participants)

As qualitative and quantitative researchers who explore the thinking and doing of human beings, we are nothing without the willing cooperation from our research participants. We pool them into a sample, then we contact them, we screen them, we coax them, we adhere to strict reminder protocols to motivate their interest and lure them into submission, and then… And then we are disappointed, bemused, and sometimes a bit angry at participants' sub-par performance as actors in our research production (be it, for example, a focus group discussion or online survey). I have read lengthy discussions from researchers who describe their participants as "demons," "lazy," "cynics," or "hostiles" because they have not paid their due respects to our quest for true knowledge but rather undermine our efforts by speaking too much or too critically in a focus group, or speeding through a survey questionnaire.



So, where the research participant was initially cajoled with assurances of their importance – "Your Opinion Counts!" – as well as our endearing gratitude for their cooperation, the participant is now literally "penalized" or subjugated to a "correction continuum" for their inappropriate response behavior. So much for love.

All of this begs the question of whether researchers expect more from their participants than is warranted. On the one hand, a research participant is recruited because he or she is "typical" of something; but, on the other hand, researchers do not want participants to be *so* typical as to disrupt the gathering of legitimate data. To deal with this, researchers often confront the problem by adjusting their questionnaire designs or utilizing moderating (or interviewing) techniques aimed at taming participants to conform to certain expectations (e.g., mixing positive-worded statements with negative statements on grid questions to counteract straightlining, or reiterating "ground rules" in group discussions to stifle participants who are too-whatever [too talkative, too shy, too critical]). These solutions, however, evade a more obvious approach – cluing the participant in on this thing called "research."

For all of the pleading that goes into recruiting research participants, it might not be a bad idea to incorporate a little education or knowledge in the screening process so that participants have an appreciation for exactly what they are agreeing to do. So, in addition to emphasizing how "interesting" and even "fun" prospective participants will find our research, it may be equally important to clearly state the seriousness (if it is not "serious," why bother?) of the research objective as well as an understanding of the response format and what participation in this format may require (e.g., in terms of time, thought, respect for others, candidness, etc.). In this way, the researcher enters into a form of partnership with the participant, with the participant taking on a supportive role to further the researcher's goals.

Or, the researcher can live in angst after the fact. Relieved that their human "subjects" actually showed up to participate but now trying to figure out what to do with these pesky participants who simply acted "typical."

Seeing Without Knowing: Potential Bias in Mobile Research

Mobile research – specifically, research by way of smartphone technology – has become a widely used and accepted design option for conducting qualitative and survey research. The advantages of the mobile mode are many, not the least of which are: the high incidence of smartphone ownership in the U.S. (more than 60% in 2015*), the ubiquitous influence smartphones have on our lives, the dependence people have on their smartphones as their go-to channel for communicating and socializing, and the features of the smartphone that offer a variety of response formats (e.g., text, video, image) and location-specific (e.g., geo-targeting, geo-fencing) capabilities.

From a research design perspective, there are also several limitations to the mobile mode, including: the small screen of the smartphone (making the design of standard scale and matrix questionnaire items – as well as the user experience overall – problematic), the relatively short attention span of the respondent or participant precipitated by frequent interruptions, the potential for errors due to the touch screen technology, and connectivity issues.

Another important yet often overlooked concern with mobile research is the potential for bias associated with the smartphone response format and location features mentioned earlier. Researchers have been quick to embrace the ability to capture video and photographs as well as location information yet they have not universally exercised caution when integrating these features into their research designs. For example, a recent webinar in which a qualitative researcher presented the virtues of mobile qualitative research – esp., for documenting in-the-moment experiences – espoused the advantages of utilizing systems that allow the researcher to identify a participant's location. Among these advantages, according to the presenter, is the ability to gain the exact location of someone's home address during an in-home use test (IHUT) which then, with the help of Google Earth, enables the researcher to actually see the property and surrounding neighborhood. The presenter went on to state that *these location images can and should be used with the intent of evaluating some aspect of this person's life such as their socio-economic status*.

The blatant bias this introduces into the research should be obvious. Where someone chooses to live *may* say something about their household income, educational achievement, and even their "social circles"; however, it is certainly not true in all cases and, indeed, such appearances can be grossly deceiving. And, even if the researcher could ascertain some idea of the individual's demographic or social group, what would be the point or use of this information? Only to deepen the bias by creating a story of someone's lived experience based on unsubstantiated claims built on preconceived stereotypical assumptions?

A similar bias creeps into mobile qualitative research when participants are asked to submit their responses in the form of videos and/or photographs *without also being asked for accompanying commentary or follow-up questions by the researcher*. By simply submitting these images without explanation, the researcher comes to his/her own conclusions which then lead to bias and error in the data which ultimately downgrades the value of the final outcomes. If the researcher conducting an IHUT study on eating habits, for example, learns from the participant that she and her family eat a "healthy" diet but sees from a submitted photograph a refrigerator containing fruits and vegetables but also donuts, Coke, and processed cheese – what is the researcher to make of that? Are the participant's eating habits really not that "healthy"? Are there additional healthier foods hidden from view in the refrigerator's compartments or drawers? Does the participant's definition of "healthy eating" include donuts, Coke, and processed cheese? Without examining the whys and wherefores *with the participant*, the researcher is left to form a subjective understanding of the fridge contents and may create a false yet seemingly plausible story about the participant from the image.

Mobile research gives the researcher new and convenient ways to learn about the lives of the people who matter most in our research designs. And yet, researchers are cautioned to tread carefully or risk infecting their data with an insidious and potentially destructive bias that comes from conjecturing stories of people's lives by relying on what researchers *see* rather than from what they *know* to be true.

* This article was written in 2016. The incidence of smartphone ownership in 2019 was over 80%.

Image captured from: http://brucemctague.com/unthinking

The Unexpected in Mixed Methods Research

It is with great expectation that mounting attention is being given to mixed methods research (MMR). The utilization of various methods – a combination of those that focus on the *quantity* of something (i.e., quantitative methods) along with ways to explore the *quality* of something (i.e., any number of qualitative methods and techniques) – holds the promise of "richer," more encompassing research solutions that go beyond the one-sided mono-method design alternative. Indeed, MMR offers the potential of added value to both the sponsors as well as the consumers of research.

There are many different ways to configure a MMR study. As briefly mentioned in a January 2017 RDR post, there are various typologies or defined formats that can guide an MMR design; better still, however, are flexible approaches to MMR that enable the researcher to shift methods as warranted by incremental outcomes and fully integrate methods throughout the process.

Regardless of the roadmap the researcher follows, it is often the case that, at some point in time in a MMR study, a qualitative component will be conducted to help explain or give deeper understanding to survey data. This particular type of sequential approach (quantitative followed by qualitative) can be extremely useful in gaining the contextual knowledge – the *why, what, how, who, when, where* of an attitude or behavior – that enlightens the researcher with real meaning behind otherwise plain-wrapped discrete bits of data. Jellesmark, Herling, Egerod, and Beyer (2012), for instance, conducted a survey concerning the fear of falling among elderly people who recently underwent a hip replacement, asking such closed-ended rating questions as "How concerned are you of falling while cleaning your house?" Jellesmark, et al. then conducted follow-up in-depth interviews with a subset of respondents in order to explore more deeply the experience of falling, asking important (almost soul-searching) questions such as "What does it mean for you to fear falling?" and "How does fear of falling affect your daily life?"

The objective in this type of sequential MMR design is to better understand – on a very human, lived-experience level – the responses to survey questions and requires a carefully chosen qualitative researcher who is fully trained and informed on the overarching research objectives as well as those specific to the qualitative

component. Importantly, this researcher must be prepared for the unexpected. The unexpected can arrive in different shapes and forms. In one respect, the researcher – like all good qualitative researchers – must be ready to hear widely varying attitudes and experiences on a given topic that are beyond anything anticipated (e.g., based on earlier research). In another respect, the researcher may meet the unexpected when follow-up interviews reveal that participants have actually misunderstood the intent of the survey question and are ill-fitted for the qualitative segment of the MMR study.

This can happen, for instance, when conducting a study with young mothers concerning the degree to which fruits and vegetables are included in their children's diets. The unexpected may happen during follow-up in-depth interviews with a subset of mothers who indicated that their children's diet is "heavy" on fruits and vegetables yet "many" participants discuss diets full of such foods as strawberry ice cream and blueberry pie along with pickles and French fries. Assuming that the researcher's intent was to measure the incidence of *fresh* fruits and vegetables in children's diets, these participants' comments in the qualitative segment of the MMR would be deemed irrelevant and these participants would be deleted from the qualitative sample. More important, however, is the implication these qualitative outcomes have for the research design as a whole and the survey design in particular. In this example, the researcher will need to go back to the research objectives, re-think the intended meaning of "fruits" and "vegetables," and re-design the survey questionnaire to more accurately measure the construct of interest.

By looking for and being attuned to the unexpected in MMR, researchers can effectively "mix" quantitative and qualitative methods by integrating outcomes regardless of where this may lead, even when it leads to revamping the MMR design.

Jellesmark, A., Herling, S. F., Egerod, I., & Beyer, N. (2012). Fear of falling and changed functional ability following hip fracture among community-dwelling elderly people: An explanatory sequential mixed method study. Disability and Rehabilitation, 34(25), 2124–2131.

Image captured from: http://www.alisanagnostakis.com/on-being-different-are-you-an-apple-or-an-orange-or-maybe-an-applorange/

Making Connections: Practical Applications of the Total Quality Framework in Mixed Methods Research

The Total Quality Framework (TQF) (Roller & Lavrakas, 2015) offers researchers a way to think about qualitative research design from the vantage point of core principles. It is an approach that helps qualitative researchers develop critical thinking skills by giving explicit attention to the quality of the conceptualization and implementation of their qualitative studies. The TQF is composed of four components, each pertaining to a phase of the research process – data collection (Credibility), analysis (Analyzability), reporting (Transparency), and the ability to do something of value with the outcomes (Usefulness).

Qualitative research is most often conducted as a standalone study but frequently conducted in conjunction with quantitative methods. A mixed methods research (MMR) design involves collecting both qualitative and quantitative data, then *integrating or connecting* the two datasets to draw interpretations derived from the combined strengths of both sets of data (Creswell, 2015). The integration of, or making the connection between, the qualitative and quantitative components is fundamental to MMR and distinguishes it from a multi-method approach that simply utilizes different methods. In contrast, a *mixed* methods design incorporates any number of qualitative and quantitative methods (and modes) with the specific intention of blending the data in some fashion. Mixed methods research is the subject of an earlier article in *Research Design Review*.

So, how do we apply the TQF to a MMR design? It is not good enough to simply think of the qualitative component of MMR as a separate feature to the overall design and apply a TQF approach to the qualitative method(s). For MMR, the TQF needs to be adapted to accommodate a qualitative-quantitative connection as discussed earlier. There are many ways to do this. A few practical applications of the TQF in MMR are outlined below.

Credibility (Data Collection)

A necessary and highly practical consideration when collecting in-depth interview data is the question of the number of interviews to complete. To address this question, the TQF presents 10 related questions* for the researcher to contemplate when in the field, such as

- Did all interviewees provide clear, unambiguous answers to key questions or issues, or does the researcher need to go back to some interviewees for clarification?
- Can the researcher identify the sources for variation and contradictions within the data?
- Do the data confirm or deny what is already known about the subject matter?

The kinds of questions the researcher might contemplate in a MMR design are similar but are now tweaked to connect qualitative data gathering with the quantitative component. In each case, the researcher is expanding his/her thinking to consider the implications associated with the collecting of qualitative data *as well as* that associated with the quantitative. The researcher conducting a MMR study might now consider,

- Did all interviewees provide clear, unambiguous answers to key questions or issues; *if not, does the researcher need to go back to the participant(s) or leave clarification for the quantitative component*?
- Can the researcher identify the sources for variation and contradictions within the qualitative data *as well as between the qualitative and quantitative data*?
- Do the data confirm or deny what is known *from the quantitative data*?

Analyzability (Analysis)

The TQF offers numerous ways to approach the processing and verification of qualitative data. One of the suggested verification strategies has to do with reflexivity and, specifically, the reflexive journal. The reflexive journal gives researchers the opportunity to respond to questions intended to foster introspection along with an understanding of the researcher's effect on the qualitative data. These reflections further the researcher's ability to verify the interpretations of qualitative data during the analysis process. In a standalone qualitative study, the researcher's reflexive journal might include the contemplation of such questions as*

- What do I think I "know" from this/these participant(s) and how do I think I "know" it?
- What assumptions did I make (what did I assume to be true) about the participant(s)?
- How did my personal values, beliefs, life story, and/or social/economic status affect or shape the questions I asked, the interjections I made, my listening skills, and/or behavior?

If the researcher was conducting MMR, the reflexive journal would address similar questions but now in the context of the broader MMR scheme. To connect the qualitative component with the quantitative, the reflexive journal asks the researcher to think about

- What do I think I "know" from this/these participant(s) and *how has that been influenced by what I may know from the quantitative data*?
- What assumptions did I make (what did I assume to be true) about the participant(s) *based on what I may know about respondents to the quantitative survey*?
- How did my *understanding of the quantitative data* affect or shape the questions I asked, the interjections I made, my listening skills, and/or behavior?

Transparency (Reporting)

The Transparency component of the TQF has to do with reporting the outcomes in the final document; specifically, reporting a "thick description" of study details (NOTE: For earlier *RDR* articles on thick description, see this April 2017 article and this 2015 article). By conveying the details of the data collection and analysis processes, the researcher allows the users of the research (e.g., other researchers, the sponsor) to examine the researcher's work and draw their own conclusions as well as transfer the design to other contexts. There are many details about the study that the researcher may want to address in the final document*, including the

- Adequacy (i.e., comprehensiveness) of the lists that were used to represent the target population.
- Failure to interview all interviewees sampled, efforts that were made to avoid this, and possible biases or weakness this may have caused.
- Field notes (e.g., note-taking procedures, examples from the field notebook).

In MMR, the qualitative researcher needs to pay attention to connecting the qualitative component with the quantitative portion of the study. To do this in the

reporting phase, the researcher interjects the thick description with details relevant to both the qualitative and the quantitative research. For example, the details might include the

- *Compatibility* of the lists with that *used in the quantitative phase*.
- Failure to interview *comparable types of people*, efforts that were made to avoid this, and possible biases or weakness this may have caused.
- Field notes (e.g., *examples when qualitative data converged/diverged with quantitative data*).

Usefulness (Doing something of value with the outcomes)

Ultimately, the objective of our research efforts is to derive outcomes that respond to the research question and provide outcomes that serve a valuable purpose. In many instances, a MMR approach fulfills this goal more so than a standalone qualitative or quantitative study by expanding and enriching the researcher's understand beyond the "borders" of a mono-method study. The *Journal of Mixed Methods Research* and other resources are filled with examples of ways MMR has contributed to important societal issues:

Health

- Cultural nuances among dementia caregivers, e.g., social stigma of dementia (Weitzman & Levkoff, 2000)

Education

- Procrastination & motivation among students with learning disabilities (Klassen et al., 2008)

Conservation

- Conservation adoption decision process among farmers, e.g., importance of communication, rapport, & incentives (Nyanga, 2012)

Psychology

- Meaning-making underlying bereaved mothers' adaptive and complicated grief responses to the death of a child from cancer (Gerrish, et al., 2014)

Food Safety

- Gap between knowledge & behavior (Meysenburg et al., 2014).

When adapting a quality approach to the qualitative component of MMR, it is not sufficient to simply treat the qualitative portion as an independent element in the overall MMR design. Indeed, it is critical and fundamental to the MMR approach to make a connection between the qualitative and quantitative facets of the study. The few practical examples discussed in this article illustrate how qualitative researchers can make these connections while, at the same time, maintaining the integrity of the unique epistemology underpinning qualitative inquiry.

*See Roller & Lavrakas (2015) for a complete list of questions / thick description details.

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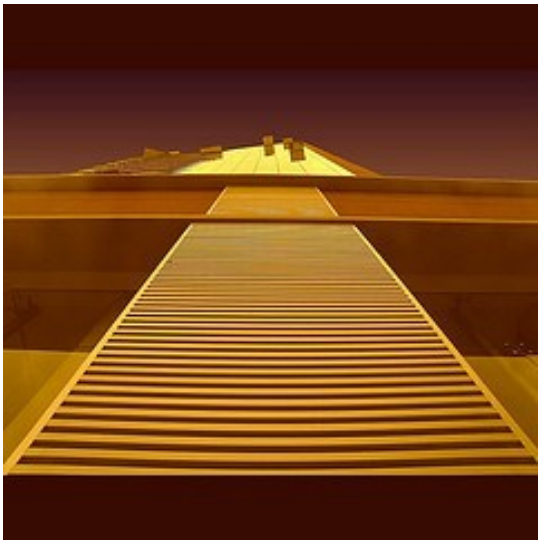
Image captured from: https://blog.wiziq.com/tag/connecting-online/

Life Is Meaningful, Or Is It?: The Road To Meaning In Survey Data



Samantha Heintzelman and Laura King, at the University of Missouri, published an article in *American Psychologist* in 2014 titled, "Life is Pretty Meaningful." In this article the authors discuss their work that explores the answer to the "lofty" question "How meaningful is life, in general?" To do this, Heintzelman and King examined two broad categories of data sources: 1) large-scale surveys – six representative surveys conducted in the U.S. and a worldwide poll; and 2) articles published in the literature that explicitly report on research studies utilizing one of two established measures of meaning in life – the Purpose in Life Test (PIL) and Meaning in Life Questionnaire (MLQ). The large-scale surveys asked yes-and-no questions such as "Did you feel that your life has meaning [in the past 12 months]?" as well as agree-disagree rating scale items such as "My life has a real purpose." Their analysis of these surveys concluded that "for most people, life is meaningful [and] comparatively few felt that their lives lacked meaning" (p. 565). Similarly, the authors' investigation of studies in the literature using the PIL or the MLQ (20- and 10-item measures, respectively) resulted in the identical finding – that is, "life is pretty meaningful" (p. 567).

In anticipation of criticisms regarding their conclusions, Heintzelman and King openly acknowledge limitations of their work, including limitations associated with self-report measures, social desirability biases, and the definition of "meaning in life."

As expected, many criticisms and concerns were expressed in response to the Heintzelman and King article. A few of these responses were published in the September 2015 issue of *American Psychologist*. Not surprisingly, these commentators question: the "oversimplicity" of using "self-ratings above an arbitrary midpoint" to conclude that most people find their lives meaningful (Friedman, 2015); the choice of measures (i.e., PIL and MLQ) and "positivity bias" resulting from people maintaining their positive self-concept (Brown & Wong, 2015); and the subjective, rather than the *intersubjective*, theory of meaning

(i.e., meaning is derived from "coordinated activity among people" not a purely subjective experience) espoused by the authors (Fowers & Lefevor, 2015).

When Pew Research Center conducts a study on the use of cell phones, the yes-no questions – and the *meaning* of the questions – are unambiguous: *Do you ever use your cell phone to participate in a video call or video chat? Do you ever use your cell phone to buy a product online, such as books, music, toys or clothing?* Quantitative research of this nature is effective because the questions the researcher is asking are clear to the respondent (minimizing respondent burden and facilitating survey completion) as well as the researcher conducting the analysis (who is able to derive legitimate conclusions and recommendations based on a high level of certainty that respondents understood the questions as intended).

But not all research topics lend themselves to a standalone quantitative solution. Meaning in life is one example but there are others. Research on health and nutrition does not always fit neatly with a quantitative-only design when – as discussed in this post concerning a 2014 Gallup report – food groups are not clearly defined (what exactly constitutes a "fruit" and a "vegetable"?), or when attempting to discern the importance of taste in consumers' decisions to purchase "more-nutritious foods" (as reported by two Danish researchers), or when trying to decipher a high importance rating to dietary habits such as "avoiding processed foods" and "eating natural foods" (Goodreau, 2015, p. 59).

The subject of God is another example of a complicated, highly personal, and potentially sensitive topic not easily reduced to a closed-ended survey question format. To illustrate, a July 2012 *RDR* post discussed "The God Survey" from SurveyMonkey that begins with the question "I wonder about God…A lot, A little, Rarely, Never." The lack of clarity – meaning – in this question is a problem for the respondent and ipso facto the analyst. As stated in the 2012 post

"As the respondent, I can only speculate what the researcher wants me to wonder about. Do I wonder about the existence of God? Do I wonder what God wants from me? Do I wonder if God is all around me or just in certain aspects of my life? Do I wonder if there is a universal God?"

So, do most people find life "meaningful"? These and other profound, complex targets of exploration deserve a more intricate research design than a series of closed-ended questions that effectively ignore respondents' understanding and personal meaning of the questions being asked, leaving behind important knowledge that is

"ultimately swallowed up in an analytical black hole where the meanings respondents give to research questions are lost forever." (*RDR*, July 2012)

As discussed in these April and May 2015 posts, there is an important role that qualitative research can play in shedding light on quantitative data and, as importantly, enabling respondents' voices – thoughts, meanings – to be heard. There are ways to accomplish this (e.g., various platforms that integrate qualitative "probes" with an online survey, full-blown concurrent qualitative interviews). They require more involved designs (and greater resources) than the closed-ended survey format. Yet, researchers are encouraged to take the road less traveled, to explore these alternative approaches, and contribute meaning to survey research.

Brown, N. J. L., & Wong, P. T. P. (2015). Life *seems* pretty meaningful. *American Psychologist*, *70*(6), 571.

Fowers, B. J., & Lefevor, G. T. (2015). The inescapability of intersubjectivity in meaning. *American Psychologist*, *70*(6), 573.

Friedman, H. L. (2015). The need for a more nuanced conclusion than life is pretty meaningful. *American Psychologist*, *70*(6), 570.

Heintzelman, S., & King, L. A. (2014). Life is pretty meaningful. *American Psychologist*, *69*(6), 561-574.

Image captured from: http://inthefootstepsofthebuddha.com/how-can-we-live-a-meaningful-life/

Mixed Research Methods & the Complex Mosaic of Human Reality

Sharlene Hesse-Biber at Boston College authored an article in *Qualitative Inquiry* in 2010 titled, "Qualitative Approaches to Mixed Methods Practice." In it, Hesse-Bider presents six case studies that utilized mixed-method (quantitative and qualitative) research designs that were "qualitatively driven." Unlike other mixed-method research where the quantitative portion is designed as central to answering the what and how questions of the research, these studies relied on qualitative methods as the *primary* source of insight combined with quantitative methods for supporting data.

One of the case studies deals with the gender-wage gap in the marketplace and specifically the impact of "structural factors" or processes within the workplace that contribute to this gap. The design was a "nested" approach with closed-end questions embedded in otherwise unstructured qualitative in-depth interviews. The research resulted in a meaningful blend of hard data pertaining to the wage gap enriched by the stories respondents shared about the workplace environment. Or more accurately, the result was a rich knowledge of the workplace culture via respondents' stories supplemented by numerical data.

In this research, the researcher did not attempt to analyze research findings by merging qualitative and quantitative outcomes but rather was "comfortable residing on multiple levels and in multiple realities that inform one another." Said another way, it was the researcher's understanding of the complexity of human existence that was important. To simply say that consumers, business customers, volunteers, employees are multi-dimensional misses the point. Researchers can look at their respondents from many angles regardless of research method. But it is the ability to fully appreciate the layers of "realities" by way of the contribution of each method *in its own right* that maximizes the researcher's potential worth to the ultimate users of the research.

The true value of our work does not lie in a focus group, a survey, spying on the social media chat du jour, or a glimpse of whatever a respondent elects to reveal

from their mobile device. Our value as researchers is our ability to analyze beyond stories or the smattering of understanding from any one method, and to utilize higher level analytical skills to lay out each piece of the research and create a mosaic that brings us ever closer to the realities of the very people who are at the core of what we do.

Qualitative & Quantitative Research Designs: Wading into the Stream of Consciousness

William James in *The Principles of Psychology* (1890) talks about Five Characters in Thought. Number three on the list is – "Within each personal consciousness, thought is sensibly continuous." His idea was that, although ever-changing, consciousness "does not appear to itself chopped up in bits…[or] jointed" but rather "it flows" like a river or stream. So, what we call someone's cognitive experience is really, what James called, a "stream of thought" or "stream of consciousness."

This is an important concept in qualitative and quantitative research because the underlying purpose in our designs is to understand the subjective links within each individual (consumer, BTB customer, employee, volunteer) respondent/participant. Our attempt to 'connect the dots' – i.e., understand each person's reality as it relates to the topic at hand by tapping into their stream of thought – drives our choice of mode, question development, and analysis protocol.

So, how do the most-oft used marketing research designs stack up? How well do they reveal the streams of consciousness that have the most impact on ultimate behavior? In 1987 (read the article), I wrote that the "classic telephone interview" falls short in its reliance on close-ended responses to prescribed questions in a structured format and that a more qualitative (specifically, in-depth interview) approach was a necessary adjunct to this and other traditional quantitative designs. I argued that an in-depth dialog was needed "to reveal the psychological flow that results in consumer action or inaction." While admitting to the cost and turnaround hurdles of a qual-quant design, there are clearly benefits to be gained from a glimpse of the river of thought, carrying with it the essential ingredients – demographic, lifestyle, psychographic – that define how each individual gets to a particular consequence in consumer (business, employee, volunteer) behavior.

A lot of innovation has occurred since 1987 and researchers have increasingly embraced new ways to think about research design in marketing research. The adoption and integration of the latest technology is an obvious example. But one of the most important by-products of the inclusion of technology modes into our design arena is the surfacing of serious discussions and applications of multi-mode designs in the industry. This is a good thing because multi-method designs have the potential of bringing us closer to the reality of respondents' flow of thought. iModerate's Research>iMpact (now part of 20/20 Research) that

incorporates qualitative moderated interviews into quantitative studies, is just one case of hybrid research solutions that are currently on the front burner.

This is all to say that I am encouraged by our new thinking in research design and optimistic that we will use the resources and capabilities at hand to unearth the streams of consciousness that will enable us to wade nearer to human realities.

Reference

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Looking Under the Hood: What Survey Researchers Can Learn from Deceptive Product Reviews

Eric Anderson and Duncan Simester published a paper in May 2013 titled "Deceptive Reviews: The Influential Tail." It talks about their analysis of many thousands of reviews for a major apparel "private label retailer" with the focus on a comparison of reviews made by customers who actually made a prior transaction (i.e., customers who actually purchased the item they were reviewing) and customers who had not made a prior transaction (i.e., customers who reviewed items they had not actually purchased). Their comparisons largely revolved around four key measures or indicators that characterize deception in online reviews and messaging: 1) a greater number of words (compared to reviews from customers who had bought the item); 2) the use of simpler, shorter words; 3) the inappropriate reference to family (i.e., referring to a family event unrelated to the product being reviewed such as "I remember when my mother took me shopping for school clothes…"); and 4) the extraordinary use of exclamation points (i.e., "!!" or "!!!"). Apparently, deceivers tend to overcompensate for their lack of true knowledge and wax eloquent about something they know nothing about. This wouldn't matter except that deceivers' deceptive reviews (i.e., reviews from customers who have not purchased the item reviewed) are more likely to be negative (e.g., giving a lower product rating) compared to reviews from actual purchasers, which in turn has the unfortunate proven effect of damaging merchants' sales.

The Anderson and Simester paper harkens back to the 2011 *Research Design Review* post concerning the vagueness of survey scale terms such as "very," "most," and "somewhat." This post discusses research showing, for example, that a response of "somewhat likely" can actually be understood by the respondent to mean that the true likelihood of an event occurring is anywhere from 100% to nonexistent (0%). Yet this is not how "somewhat likely" data is typically interpreted and, indeed, it is often combined with "very likely" data to form an umbrella category of "likely" respondents.

Similar to deceptive reviews, quantitative research designs that allow for a wide range of subjectivity and individual interpretation fall victim to portraying false impressions leading to erroneous conclusions. Just as visitors to a website may think they are reading a legitimate product review from an actual purchaser/user, what researchers think they see in their data may not be anywhere near the reality respondents hoped to express in their responses.

As survey researchers we are well-advised to take a lesson from researchers such as Anderson and Simester by exploring the indicators – in our research designs as well as our data – that may lead us to deceive ourselves. By routinely "looking under the hood" of our quantitative research with qualitative methods that examine the reality of how and what respondents think, we will be enriched with the true meaning of the constructs our survey data purport to measure.

Humanizing Survey Question Design with a Qualitative Touch

Researchers know that "good" survey questionnaire design begins with a preliminary qualitative research phase that serves to expose the nuances of the research topic or category – such as the most pertinent issues and the relevant concerns or "issues within the issues" – along with the manner by which the target population talks about these issues – that is, the particular words, expressions, and terminology used by the target group. In this way, the survey researcher can hope to create user-friendly survey questions that speak *to* respondents rather than *at* respondents.

A preliminary qualitative phase is good and necessary, but employing the talents of a qualitative researcher *during survey question development* is an equally-important step. Qualitative researchers spend much of their lives listening to people talk about a host of attitudinal and behavioral issues, listening to the use of language, and using these conversations to interpret where people stand in relationship to the research goal. Who better then to consider the intention of each survey question in conjunction with the results of the qualitative phase and to mold the questions in a recognizable, conversational format.

A qualitative touch may be all that is needed to transform a question such as

Do you think soft drink distribution is adequate?[1]

To something friendlier and more direct…

Are soft drinks easy to find when you want one?[1]

Or, modify a question such as

Is the fee structure on your depository account at Bank ABC within acceptable limits?

To something that clearly identifies the intention of the question…

Do you think the $5 ATM fee charged by Bank ABC is reasonable?

Or, clarify a question such as

How important is the portable nature of your mobile device in your day-to-day activities?

To something that explains terms and is more specific…

How has the ability to take your smartphone with you wherever you go altered your daily activities?

Utilizing qualitative sensitivities to unwrap the true purpose of survey questions while replacing corporate jargon with the way real people talk and think, humanizes the research "instrument" which is a win-win for researchers and respondents. Researchers gain higher rates of cooperation and completion (along with lower non-response); and respondents are not left to guess – and possibly guess wrong – the meaning of questions, allowing them to move more easily through the battery of questions and, in the end, find that they actually enjoyed the research process. Gee, imagine that.

[1]From http://survey.cvent.com/blog/cvent-web-surveys-blog/online-survey-pitfalls-writing-complex-survey-questions

Image captured from: https://www.revointeractive.com/Sunlight-Readable-Open-Frame-Monitors.php

A Qualitative Approach to Survey Research Design: Shedding Light on Survey Responses

In "'I Wonder About God' & Other Poorly-Designed Questions" (*Research Design Review*, July 25, 2012), it is argued that weak survey question design has a "potentially negative impact on analysis, which in turn leads to wrong conclusions, which in turn leads end users along a path of misguided next steps." As one of several examples, this article highlights the ambiguity embedded in SurveyMonkey's "The God Survey"; specifically, the problematic first question that asks how often "I wonder about God."

Poorly-designed questions raise serious concerns about how or *if* the researcher can legitimately analyze the resulting data (while also tackling issues of reliability and validity), a concern made more profound by the frequent failure to *even consider* the alternative interpretations respondents may give to survey questions. By failing to recognize the analytical limitations associated with "questionable questions," the survey data "will be ultimately swallowed up in an analytical black hole where the meanings respondents give to research questions are lost forever."

The October 2014 article – "Humanizing Survey Question Design with a Qualitative Touch" – promotes the idea of using qualitative methods "to create user-friendly survey questions that speak *to* respondents rather than *at* respondents." The point being that "utilizing qualitative sensitivities to unwrap the true purpose of survey questions while replacing corporate jargon with the way real people talk and think, humanizes the research 'instrument' which is a win-win for researchers and respondents."

Equally important to the notion of integrating qualitative sensibilities in the question-development phase is the additional step of inserting measures of clarification in the survey interview/questionnaire itself. To illustrate, it was suggested in this article that Pew Research's 2013 study asking about government surveillance could have benefited from "a simple add-on question at the end of the survey interview – such as, 'Were you thinking of anything in particular when I asked you about the government's surveillance programs?' [IF YES] What were

you thinking?"" – in order to "shed some light on the extent to which respondents were in sync with the researcher's meaning [of government surveillance programs]." Shedding light on what respondents are actually thinking when responding to survey questions goes a long way to increasing the credibility and quality of survey research.

Fortunately, there are researchers who have designed solutions and platforms specifically with the idea of marrying qualitative insight with quantitative survey design. 20|20 Research is just one example of a provider whose technology enables the researcher to incorporate qualitative IDIs or group discussions with an online quantitative study and thereby add depth and *meaning* to survey responses. iModerate (utilizing their ThoughtPath approach), Knowledge Networks (via Qual^{e} Probe), and Focus Pointe Global (with its Quickconnect Onsite capability for central location testing) offer their own qualitative-quantitative integration solutions.

The question is: Why hasn't the idea of incorporating qualitative techniques with the survey research interview received greater attention; and, indeed, why hasn't a qualitative-quantitative approach become a best practice in survey research design? It does not take much looking around to find reports of survey findings that could use some clarification – some *justification* – to explain the purported conclusions from the data. It would be good, for instance, to understand why Hispanics in the 2014 Gallup-Lumina Poll were much more likely to state that "education beyond high school is affordable to anyone in this country who needs it" rather than, as Gallup concludes, attribute their relatively high agreement to "greater optimism." *Are* Hispanic people more "optimistic" on the affordability of higher education? And, if so, what exactly does it mean to harbor "greater optimism" and how do Hispanic respondents operationally define that? And, if optimism has nothing to do with their responses to that survey question, what *does* explain why more Hispanics believe in the affordability of higher education? The integration of a qualitative approach – that sheds light on the context and meaning of survey responses – is a useful and necessary condition to a quality research design.

Image captured from: http://www.laboratoryequipment.com/news/2015/03/research-sheds-light-how-plants-control-themselves

Helping Survey Data "Line Up": Qualitative Lends a Hand

At the 2015 AAPOR conference in Florida, Paul Lavrakas and I taught a short course on qualitative research design. The bulk of the class was spent on applying the unique constructs and techniques associated with the Total Quality Framework (TQF) to five qualitative research methods — in-depth interviews, focus group discussions, ethnography, qualitative content analysis, and case-centered research (i.e., case study and narrative research). But before jumping into the application of the TQF, we began by talking about the distinctive attributes of qualitative research, particularly the emphasis on context and interconnectedness that is inherent in qualitative data. Indeed, we stressed the complexity — *the "messiness"* — of qualitative data collection and analysis, along with the unparalleled researcher skills (such as flexibility) needed to perform high-quality and ultimately useful qualitative research.

This course was one of a handful of discussions pertaining to qualitative research at a conference that is heavily weighted toward survey methods. As both a qualitative and quantitative researcher, it is interesting to sit in session after session, learning of the latest work in survey research, wearing both hats. Most striking in these presentations are survey researchers' usual uncertainties and *frustrations* with the constructs they are trying to measure. This is not new. Survey researchers have always struggled with making heads or tails of their data, with the goal of producing data that near-perfectly aligns with respondents' thinking (i.e., construct validity). One presenter expressed her attempts to achieve construct validity as "trying to get it all to line up."

Philip Brenner — whose work has been discussed elsewhere in this blog — continues to look for "the perfect series of questions" that will account for the many ways people interpret "church attendance." Kristen Miller is using various techniques to explore the "very subjective" construct of pain, i.e., the fact that there are varying interpretations of questions pertaining to "pain." Erica Yu is concerned about relieving survey respondent burden but worries about the subjective nature of "burden" and how to define "perceived burden" — or what is "burdensome" — which would enable her to modify the questionnaire design to reduce this

"burden." And, Josh Pasek, Michael Schober, and others are exploring ways to link Twitter messages with survey data, forcing these researchers to make various assumptions in order to address uncertainties having to do with: how individuals use Twitter, tweeters' true identities, and the "real" (subjective) meaning in their messages.

Which brings us back to qualitative research. As much as survey research serves many essential roles in our society and "we" are better for it, there are times when the obsession to "get it all to line up" — to neatly account for all interpretations of church attendance, pain, burden, and even our tweets — becomes a fool's game. Without, that is, the help from qualitative inquiry. This is where multi-method approaches that interject a qualitative component enabling respondents to explain their meaning throughout the survey offer potentially viable design solutions.

Otherwise, a totally quantitative data-driven approach, that excludes a qualitative measure of how people think about the constructs of interest, will continue to leave survey researchers uncertain and frustrated as they go about the business of "trying to get it all to line up."

Image captured from: http://allisonbensonau.com/2014/06/16/section-80d-what-is-it-why-is-it-important-how-to-get-your-ducks-in-a-row/